



**Lawrence Berkeley National Laboratory
Project Management Office**

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PROJECT PLAN

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Project Management

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1.0 PURPOSE

A project plan is the framework that correlates project objectives with a plan for accomplishment. This framework helps to ensure projects are accomplished in a well planned, cost-effective, responsive, safe and timely manner.

2.0 SCOPE

Project managers will develop and maintain a current project framework for each of their projects. This framework describes the responsibilities of the LBNL organizations involved in the project, defines roles, restates the mission need, provides a general overview of the project, and outlines cost and schedule data. It includes an accurate reflection of how the project is to be accomplished, resource requirements, technical considerations, risk management, and roles and responsibilities.

3.0 REFERENCES

DOE Order 413.3.
LBNL Earned Value Management System Description.
PMO Procedure 1.2, Project Work Breakdown Structure (WBS).
PMO Procedure 1.3, Project Organizational Breakdown (OBS).
PMO Procedure 1.4, Control Accounts, Work Packages & Planning Packages.
PMO Procedure 1.5, Control Account Plan/Work Authorization.

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PMO Procedure 1.6, Project Schedule.
PMO Procedure 1.7, Cost Estimating.
PMO Procedure 1.8, Monthly Status/Reporting.
PMO Procedure 1.9, Change Control.

4.0 PROCEDURE

Project plan documents should not be developed in any more detail than is necessary to permit cost-effective management of the project, or to satisfy any regulatory requirements. This project framework will at a minimum consist of:

4.1 Scope

The current project scope document approved by the project sponsor. This document will clearly identify the project users and other designated interests.

4.2 Work Breakdown Structure

The project Work Breakdown Structure (WBS), which is defined by the Project Manager, is an indented listing of all the products, work tasks, and services provided by the project and should be product-oriented. It is used as a common base for all project planning, scheduling, budgeting, cost accumulation, and reporting performance during the entire life of the project. The WBS is extended to a level of detail appropriate to support effective project management.

4.3 Organization Breakdown Structure

The Organization Breakdown Structure (OBS) is a project organizational framework for identification of accountability, responsibility, management, and approvals of all authorized work scope. It identifies and describes the organizations that will provide resources to perform work identified in the WBS. The OBS helps in the creation of the most efficient organization, by taking into account availability and capability of the project team, including major subcontractors.

4.4 Responsibility Assignment Matrix

The WBS is integrated with the OBS to establish a Responsibility Assignment Matrix (RAM), which identifies locations of potential management control points at matrix intersections. These are called control accounts. Initially, they are considered to be "potential" control accounts, because while there may be work at a particular intersection, it may be small enough and appropriate in character

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to be incorporated into a control account assigned to a different organization and manager, but within the same WBS element. The RAM ensures that each control account is assigned to one organizational entity responsible for the management of the work.

4.5 Control Account Planning

Control account planning consists of the efforts taken to establish time-phased budgets for each control account identified for project execution. The Project Manager shall, through the development of the RAM, identify candidate individuals from the functional organization to act as Control Account Managers (CAMs). Laboratory Functional Managers assist the Project Manager with the assignment of CAMs for those areas. These CAMs have the primary responsibility for developing and managing the control account budgets. A Control Account Plan/Work Authorization is used by the Project Manager to authorize and delegate responsibility for budget, schedule, and scope requirements to the CAM.

4.6 Performance Measurement Baseline

The Performance Measurement Baseline (PMB) is the time-phased budget plan used to measure project performance. The PMB is the summation of the time-phased budgets for all of the control accounts and summary-level planning packages, plus applicable indirect budgets and any undistributed budget.

4.7 Change Control

Project plan documents will be approved and fixed consistent with DOE Order 413.3, or for non-DOE projects, by the Laboratory Project Management Officer (PMO). Approved project documents will be maintained under configuration management and may not be revised without proper authorization. It may be revised at any time, but such revisions may be made only by persons having the authority to do so. A Baseline Change Proposal (BCP) log will be maintained by the project manager to record all significant changes in the project objectives.

5.0 APPENDIX

Appendix A: Project Responsibility Assignment Matrix (RAM).

